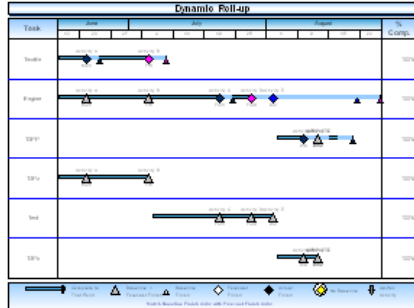


MS Project Import

SummaryChart: Dynamic Roll-UP

Dynamic Roll-Up offers a unique format with several options that make it easy to produce and maintain a "big-picture" chart for presentations to upper management.



It's possible to "tag" tasks within the Microsoft Office Project file to appear together on a task row even if they are scattered throughout the MS Project file.

To create a Dynamic Roll-Up summary chart:

Dynamic Roll-Up charts are created by collapsing groups of tasks into one summary bar. You can choose which tasks to group together by assigning them a coordinating code name.

First, create a *Text* field in your project file that will contain code names. These code names will control the final output of the Milestones schedule.

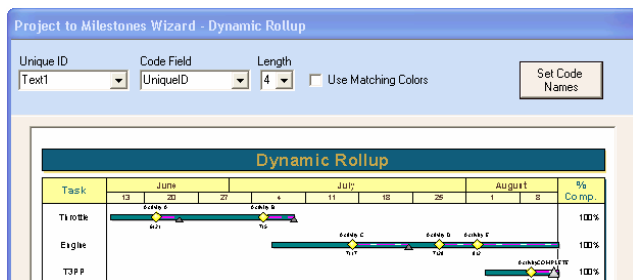
Task Name	Text7
Project 1	
Activity A	T3PU01
Activity B	T3PU02
Activity C	T3PK01
Activity D	T3PK02
Activity E	T3PK03
Activity F	T3PU03
Activity G	T3PU04
COMPLETE	T3PUFN

For example, the following codes were used to create a Dynamic Roll-Up schedule for an aerospace project:

Project tasks that fall under a specific code are labeled in the *Text* field in sequence, i.e. *T3PU01, T3PU02, T3PU03,...*

T3PU T3PA
 T3PK T3PB
 T3PC T3PD

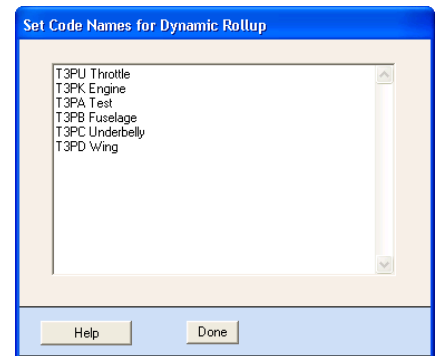
Then, in Milestones, choose **Create Report from Microsoft Project** on the **Connections** menu... and open the coded Project file. In the Milestones Project Import Wizard, choose *Coded Summary Chart* and *Dynamic Roll-Up*.



1. Choose the Project field that contains your text codes
2. Set the length of the text code (in this case, 4)
3. And click the button to "Set Code Names."

NOTE: "Set Code Names" controls the task name that will appear for each summary bar of tasks grouped by code.

In the *Set Code Names* window, label each text code by entering the code named, followed by a space or tab, and then the label for that code. For example:



T3PU Throttle
 T3PK Engine
 T3PA Test
 T3PB Fuselage
 T3PC Underbelly
 T3PD Wing

Click through the rest of the Import Wizard, and make selections for symbology and layout. The resulting presentation schedule will contain summary bars with milestones rolled up representing the actual and baseline finish dates of each task grouped under the same text code.

Each task row will be labeled with the name you assigned

